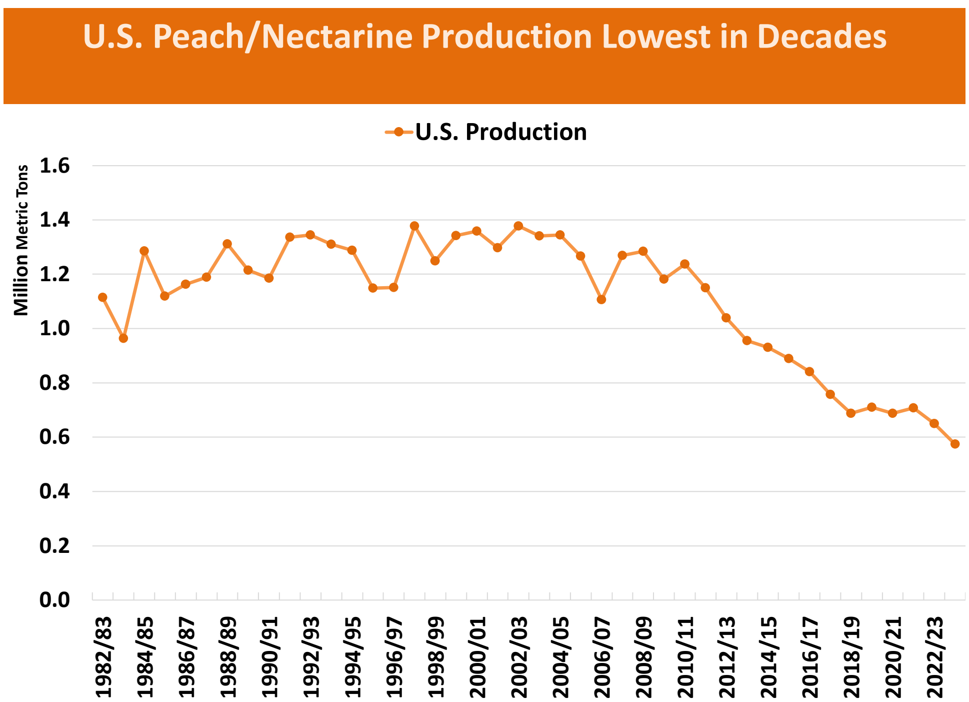
United States Department of Agriculture Foreign Agricultural Service

September 2023

Fresh Peaches and Cherries: World Markets and Trade

U.S. Peach and Nectarine Production Falls to Lowest Level Since at Least 1982/83

U.S. peach and nectarine production for 2023/24 is forecast down to 574,000 metric tons. Production has been fairly stable during the last 5 years, range-bound between 650,000-710,000 tons, but weather events in top producing states will drive supplies below this range in 2023/24. California's peach crop is expected to decline as substantial rain and cool temperatures delayed and extended the bloom, while damaging March freezes following early blooms are forecast to slash production in South Carolina and Georgia.



The 2023/24 forecast continues a downward trend that started in 2011/12. Output fell below 1.0 million tons in 2013/14 for the first time in decades where it has since remained. U.S. output declined over 30 percent between 2013/14 and 2022/23, with volumes dropping 300,000 tons to 650,000. Production has been slipping in all growing states, but the most significant decline has been in California, with combined peach and nectarine production down 200,000 tons during that time. According to USDA's National Agricultural Statistics Service (NASS), California accounts for an average 80 percent of U.S. output, and nearly 100 percent of peaches for processing. Declining demand for processing peaches has driven the drop in peach production, particularly in Clingstone peaches. Used almost exclusively for processing, volumes of Clingstone have plunged 43 percent in volume. In addition, 2022/23 California nectarine production fell below 100,000 tons for the first time since the early 1970's on crop damage from rain, hail, and near-freezing temperatures.

Approved by the World Agricultural Outlook Board/USDA

Damaging weather has pushed U.S. peach and nectarine production to its lowest levels in decades, exacerbating already reduced volumes prompted by declining demand. U.S. output is likely to rebound above 600,000 tons in the short-term, but it remains to be seen if the longer-term downward trend can be checked.

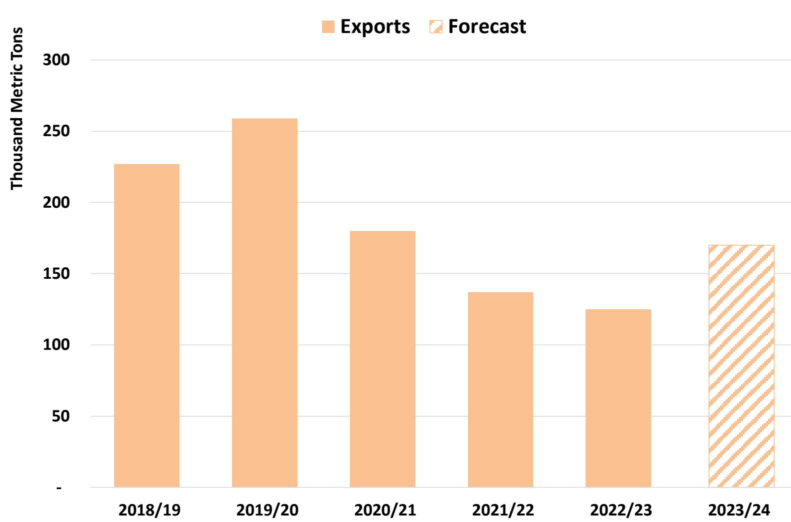
Fresh Peach and Nectarine 2023/24 Highlights

World production is forecast up 827,000 metric tons to 25.0 million as good growing conditions boost output in China and the European Union. Exports are projected up 62,000 tons to 874,000 as EU shipments rebound on recovering supplies in Spain. Greater shipments to Iraq and Kazakhstan are expected to boost imports 21,000 tons to 852,000.

China production is expected to rise 500,000 tons to 17.5 million as good growing conditions in southern provinces more than offset bloom damage in northern provinces due to cold temperatures and snow. Higher yields are anticipated to counter losses from continued declining acreage. However, lower returns are encouraging farmers to reduce acreage or convert to more profitable crops such as cherries. Growers with orchards on land defined as farmland (as defined by government regulations) are also being encouraged or required to clear orchards to boost area for grains, cotton, oilseeds, sugar, vegetables, and forages. Exports are forecast to remain nearly unchanged at 60,000 tons as greater shipments to Vietnam mostly offset losses to Kyrgyzstan.

EU production is projected up 401,000 tons to 3.7 million as Spain makes a strong recovery from last year's damaging cold, frost, and rain, more than offsetting weather-induced losses in Italy, Bulgaria, Hungary, and Poland. Greater supplies are expected to boost exports 36 percent to 170,000 tons, rebounding after 3 years of declines. Imports are forecast unchanged at 40,000 tons on sustained supplies from Turkey.

EU Peach/Nectarine Exports Rebound on Higher Supplies



Turkey production is anticipated to hold steady at 1.0 million tons as good growing conditions sustain output near last year's record level. Peach acreage has remained mostly unchanged the last 10 years, though modest gains in yields continue due to the conversion of orchards to better quality and more productive varieties. However, nectarines increasingly account for a greater share of planted area and output driven by local and foreign consumer demand. Consumption is expected to shrink slightly as greater volumes are directed towards overseas markets, especially Russia, Iraq, and the European Union. Exports are up 11,000 tons to 215,000 for a fourth straight year of gains.

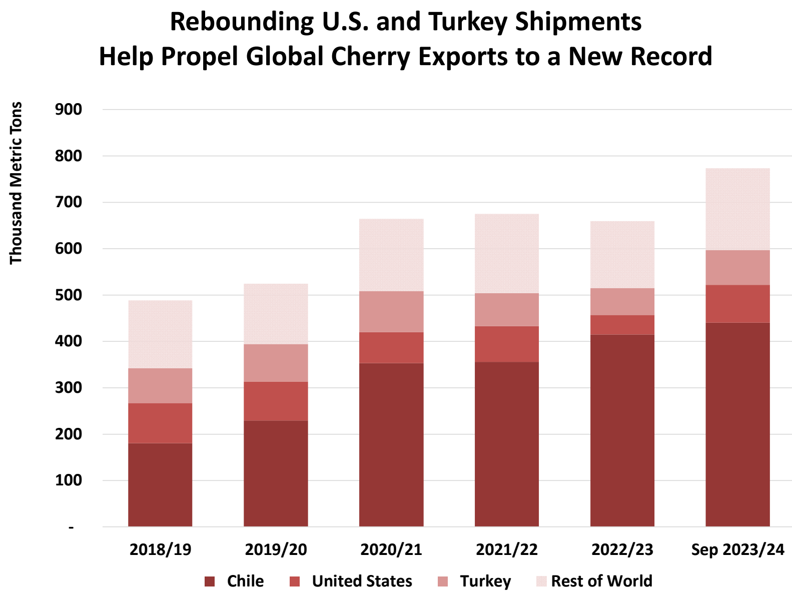
U.S. production is forecast down 76,000 tons to 574,000 to the lowest level in at least 40 years. The three largest producer states - California, South Carolina, and Georgia - all experienced damaging weather, with South Carolina and Georgia suffering from a second consecutive year of destructive freezes. USDA-NASS surveyed industry and published the U.S. forecast for peach production in the August 2023 *Crop Production* report. Exports are projected down 11,000 tons to 50,000, suppressed by lower supplies, while imports are expected to remain flat at 32,000 tons as higher shipments from Mexico offset lower shipments from Chile at the start of the marketing year (January-December). Consumption is forecast down to 556,000 tons on lower supplies and flat demand for Southern Hemisphere supplies during the off-season.

Chile production is anticipated to remain steady at 164,000 tons as good winter rainfall sustains output and declines in peach acreage are offset by new nectarine plantings coming into production. In line with stable production, exports are forecast flat at 105,000 tons.

Russia imports are expected to remain nearly unchanged at 315,000 tons on sustained shipments from Turkey. Russia remains the world's top importer, accounting for nearly 40 percent of world imports.

Fresh Cherry 2023/24 Highlights

World production is forecast up slightly, rising 114,000 tons to 4.8 million as weather-reduced supplies in the European Union largely offset gains in Chile, China, Turkey, and the United States. Rebounding shipments from the United States and Turkey are expected to boost exports over 100,000 tons to a record 773,000. Imports are forecast up 102,000 tons to 730,000 as greater output supports rising consumer demand from top importers.



Turkey production is expected to rise nearly 70,000 tons to 900,000 as favorable rains boost yield and new plantings of high-yield varieties come into production. Exports are projected to surge 17,000 tons to 75,000 on greater output. Higher shipments to the European Union are expected, with increased EU demand anticipated to shift some volume from Russia.

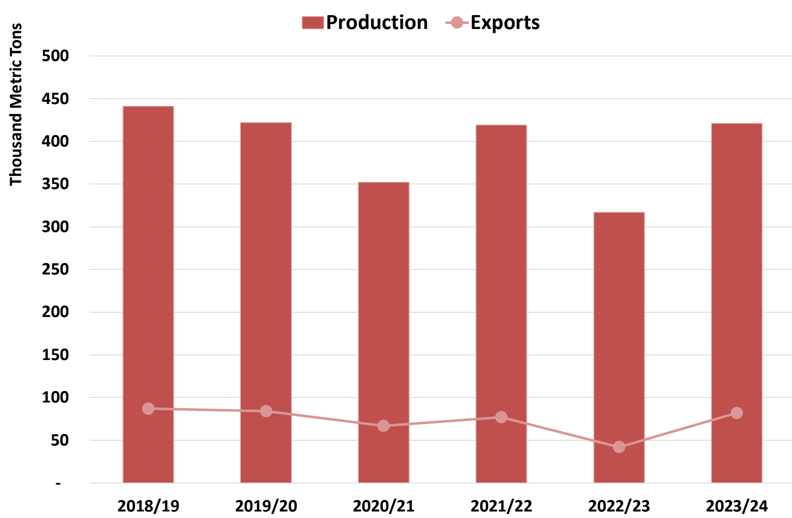
China production is projected up 80,000 tons to 760,000 on good growing conditions in the provinces of Shandong, Sichuan, and Liaoning. Output is expected to rebound in the largest producing province of Shandong, recovering from last year's high temperatures and drought. Acreage continues to expand, especially in northwest and southwest provinces, while investments to improve cherry quality are continuing, including tree coverings for rain protection. Imports are expected to improve 32,000 tons to 410,000 as continued strong demand is supported by greater shipments from Chile and recovering supplies in the United States.

Chile production is up 31,000 tons to 502,000 as new trees continue to come into production. With greater supplies and continued strong demand from China, exports are also expected to rise again, though at a more modest pace than recent years, up 25,000 tons to 440,000. China accounts on average for 90 percent of Chile's total exports; however, shipments have also been increasing to other markets, including the United States, as Chile strives to diversify export markets.

EU production is forecast to drop over 20 percent, falling 174,000 tons to 657,000 as frost and heavy rains during bloom and fruitset reduced output in most of the producing member states. Exports are expected to remain unchanged at 15,000 tons as reduced supplies discourage expanded shipments and trade remains mostly intra-EU.

U.S. production is forecast to surge over 100,000 tons to 421,000, a strong rebound as sweet cherries in California, Oregon, and Washington recover from last year's weather-damaged crops. However, tart cherries are expected down due to cold spring temperatures and frost in Michigan, impeding a stronger recovery in total U.S. output. Higher supplies are expected to drive a rally in exports, nearly doubling to 82,000 tons and boosting shipments to most markets. If realized, the United States would surpass Turkey and again become the leading Northern Hemisphere exporter. Imports are expected to continue their upward trend, edging up to 30,000 tons on greater shipments from Chile.

U.S. Cherries Recover From Last Year's Weather Damage



Russia imports are projected up after 2 years of decline, rising 20,000 tons to 120,00 as reduced shipments from Turkey are more than offset by higher shipments from Azerbaijan and Uzbekistan.

Future Releases and Contact Information
For additional information, please contact Elaine Protzman at (202) 720-5588 or *elaine.protzman@fas.usda.gov*

To receive the circular via email, go to https://public.govdelivery.com/accounts/USDAFAS/subscriber/new. Please visit https://www.fas.usda.gov/data/stone-fruit-world-markets-and-trade to view archived reports.

The *Fresh Peaches and Cherries: World Markets and Trade* circular is based on reports from FAS Overseas Posts and on available secondary information. The individual country reports can be obtained on FAS Online at: https://gain.fas.usda.gov/Pages/Default.aspx.

PSD Online
The entire USDA PSD database is available online at: https://www.fas.usda.gov/psdonline

Additional Resources
For additional data and analysis, please refer to the USDA-FAS website: https://www.fas.usda.gov/data/commodities/fresh-fruit

NOTES TO USERS:
European Union definition: includes 27 countries in the customs union (Austria, Belgium/Luxembourg, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden).

Marketing Years:
- **Peaches/Nectarines -** Northern Hemisphere countries are on a January-December year. Southern Hemisphere countries are on a November-October year indicated as the first year of the split year.
- **Cherries** - Northern Hemisphere countries are on an April-March year. Southern Hemisphere countries are on a November-October year indicated as the first year of the split year.

Peaches and Nectarines, Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2018/19	2019/20	2020/21	2021/22	2022/23	Sep 2023/24
Production						
China	13,500	15,800	15,000	16,000	17,000	17,500
European Union	3,881	4,066	3,224	2,907	3,253	3,654
Turkey	789	830	890	892	1,008	1,000
Iran	611	591	650	687	687	687
United States	687	709	687	707	650	574
Mexico	161	159	173	217	217	217
Brazil	220	183	202	199	199	199
Uzbekistan	162	189	184	193	193	193
South Africa	152	158	175	181	181	181
Argentina	226	198	101	168	168	168
Other	690	661	619	623	623	634
Total	21,080	23,545	21,906	22,775	24,180	25,007
Domestic Consumption						
China	13,458	15,706	14,959	15,989	16,981	17,480
European Union	3,652	3,801	3,058	2,813	3,169	3,524
Turkey	663	725	727	722	804	785
Iran	596	557	550	621	637	632
United States	656	675	657	657	621	556
Russia	264	231	324	292	361	358
Mexico	192	190	195	257	245	242
Brazil	241	196	214	210	212	219
Argentina	222	196	96	166	165	166
South Africa	136	138	145	151	154	152
Other	914	1,057	959	862	849	871
Total	20,993	23,470	21,886	22,739	24,199	24,984
Imports						
Russia	228	194	286	250	317	315
Iraq	40	82	76	59	53	70
United Kingdom	74	93	63	57	64	70
China	22	27	37	33	45	40
European Union	27	24	39	43	41	40
Saudi Arabia	34	38	49	39	36	40
Kazakhstan	48	58	53	32	24	35
United States	38	36	31	33	32	32
Canada	37	39	41	41	36	30
Switzerland	29	31	29	28	29	30
Other	189	248	221	174	154	150
Total	765	870	926	789	831	852
Exports						
Turkey	127	105	163	170	204	215
European Union	227	259	180	137	125	170
Chile	97	102	99	112	104	105
Uzbekistan	54	56	86	56	77	70
China	63	121	78	45	63	60
Iran	16	35	100	67	50	55
Jordan	50	70	54	59	42	50
United States	69	71	61	83	61	50
South Africa	18	21	32	31	28	30
Azerbaijan	9	8	8	23	27	25
Other	92	64	61	43	31	44
Total	821	914	921	825	812	874

Note: The marketing year begins in January of the first year for Northern Hemisphere countries and November of the first year for Southern Hemisphere countries.

Cherries (sweet and sour), Fresh: Production, Supply and Distribution in Selected Countries

(1,000 Metric Tons)

	2018/19	2019/20	2020/21	2021/22	2022/23	Sep 2023/24
Production						
Turkey	824	846	914	874	833	900
China	340	450	520	630	680	760
European Union	835	738	653	726	831	657
Chile	206	256	386	392	471	502
United States	441	422	352	419	317	421
Russia	279	292	306	332	332	332
Uzbekistan	229	241	256	287	287	287
Iran	214	253	284	279	279	279
Ukraine	303	236	238	256	256	256
Serbia	147	114	181	171	171	171
Other	254	237	247	229	231	236
Total	4,071	4,086	4,336	4,594	4,687	4,801
Domestic Consumption						
China	520	680	856	948	1,058	1,170
Turkey	749	766	827	803	775	825
European Union	851	770	688	751	844	682
Russia	372	378	417	440	432	452
United States	366	347	298	363	302	369
Ukraine	300	233	239	257	257	256
Iran	212	238	257	259	265	249
Uzbekistan	201	224	224	226	261	247
Serbia	133	98	164	159	157	161
Chile	26	27	33	36	56	62
Other	320	291	303	313	251	284
Total	4,048	4,052	4,304	4,555	4,656	4,758
Imports						
China	180	230	336	319	378	410
Russia	93	85	111	108	100	120
European Union	43	50	53	44	29	40
Canada	28	28	26	32	19	30
United States	12	10	13	21	27	30
Korea, South	19	15	17	19	11	20
Kazakhstan	25	8	18	29	9	15
Taiwan	12	12	13	14	12	15
United Kingdom	15	13	14	16	14	15
Iraq	14	15	12	10	9	10
Other	25	24	24	25	21	25
Total	466	491	634	637	628	730
Exports						
Chile	180	229	353	356	415	440
United States	87	84	67	77	42	82
Turkey	75	81	88	71	58	75
Uzbekistan	28	17	32	61	26	40
Azerbaijan	24	27	31	20	29	35
Iran	2	16	27	20	13	30
European Union	27	18	15	19	16	15
Moldova	14	7	10	8	13	15
Canada	13	9	7	10	12	10
Serbia	16	17	18	12	14	10
Other	24	19	18	22	20	21
Total	488	524	664	675	659	773

Note: The marketing year begins in April of the first year for Northern Hemisphere countries and November of the first year for Southern Hemisphere countries. Fresh cherries includes sweet and sour cherries.